PlanMill Absence

User Guide

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13/10/2009

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1. About this guide

To find the right information

The **PlanMill Absence** User Guide describes the functions and use of PlanMill Absence both as a *standalone* product and as an *add-on* module for existing PlanMill users.

The first part of this guide gives you a general overview of terminology used as well as describing the main user interface in My WorkSpace , the entry point for all PlanMill users.

Next, this guide describes the typical workflow of specific users whether as employee, system power user, employer, or human resources manager. In addition, a list of key features including the default fields as well as forms, lists, and screenshots of the Graphical User Interface (GUI) of PlanMill Absence is shown.

Finally, you will learn from the **Quick guide scenarios** on how the tool is used in various everyday situations.

Typographic conventions

The following conventions are used in this guide:

1. **Bold:** Names of buttons, menu items, check boxes, fields, and others.
2. *Italics*: Signs and highlighted texts.
3. Blue text: Cross-reference and links

Resources

More information on PlanMill Absence and all PlanMill products are also available as:

- **Online Help**. This is a browser-based content that you can access through the **Help** menu of your PlanMill product.
- **Help on the web**. Check for updates and additions or download the version of PlanMill Absence User Guide from our website, www.planmill.com

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2. Getting started in PlanMill Absence

PlanMill Absence solves issues of absence management, improves workflow, and reduces operational costs of organisations. As an expansion to PlanMill's growing web-based business application suite, this robust product is deployed either as a *standalone* or as *optional* module to existing PlanMill users.

The basic function of PlanMill Absence is to manage the workflow for requesting and accepting absences. Additionally, it will perform the annual holiday calculation based on the absence entries in the database and easily imports and exports data within the human resources (HR) systems of companies and organisations.

Terminology

To understand the features and functions of PlanMill Absence, below is a list of key words used in this document.

Absence	Refers to vacations, leaves, or any types of absences by a person or employee working in a company or organisation. The finish date (and optional time) of absence is entered in the Absence field.
Absence users	Refers to all the persons or employees in the company listed in the HR database, which for example, can perform general actions within the PlanMill Absence system.
Absence type	By default, the absence type includes: *Annual holiday, Sick leave, Sick leave due to child, Maternal leave, Paternal leave, Military leave, Unpaid holiday, Paid holiday, Overtime leave, Balance leave, Bonus holiday pay, Military refresher, Layoff,* and *Child care leave*.
Annual holiday	Refers to the holiday calculation according to Finnish annual holiday law (implemented by default).
HR-access rights	This access right allows all persons in this role for example to view all absences and accept interruptions in absence request
iCal	iCalendar is a computer file format which allows internet users to send meeting requests and tasks to other internet users, via email, or sharing files with an .ics extension. Recipients of the iCalendar data file (with supporting

	software, such as an email client or calendar application) can respond to the sender easily or counter propose another meeting date/time. PlanMill Absence can export the information of persons and absences as an iCal report.
Indicators	Users can select favorite key performance indicators (KPI) from the Indicators tab.
Person	The name of the person creating the absence form. This refers to any of the employees of the company.
Power User	Has an access right to create new users and maintain other administrative data in the system. The Power User also sees all available functions and data in the specific PlanMill edition that the company has purchased. In the standalone edition of PlanMill Absence, the **Power User** role is by default the only role with HR access rights, and can import and export data within a company's HR systems.
Superior	Every user can have one superior (e.g. manager) defined in the user's user form information. The **Superior** has the right to accept and reject all absences requested by the employees (users) under him.
Vacation year	Contains data on employees' vacation year amounts and the time showing remaining work days, annual holidays, and remaining bonus holidays.
Work Scheduler	Used commonly by the **Resource** & **Project Manager** for tracking tasks, requests and their deadlines and shows assignments and performers assigned to the tasks. In PlanMill Absence, this is useful for checking current resources for the company during multiple projects.
Workspace	Also called **My Workspace,** this is the PlanMill dashboard where users can customize screen layouts from different readymade options and can add frames, gadgets, and widgets.

'My Workspace' in PlanMill

PlanMill Absence is opened and viewed by existing PlanMill users from **My Workspace > HRM > Absence**. As a standalone product, PlanMill Absence can be opened similarly with the same user interface, but without other functionalities of the PlanMill business application suites.

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By clicking on **Personalize,** the contents of **My Workspace** can be adjusted to fit individual user needs, for example by selecting the different dashboards available or adding customized content to workspaces within PlanMill views. These actions can be performed under **Select layout** and **Add & remove your preferred frames.**

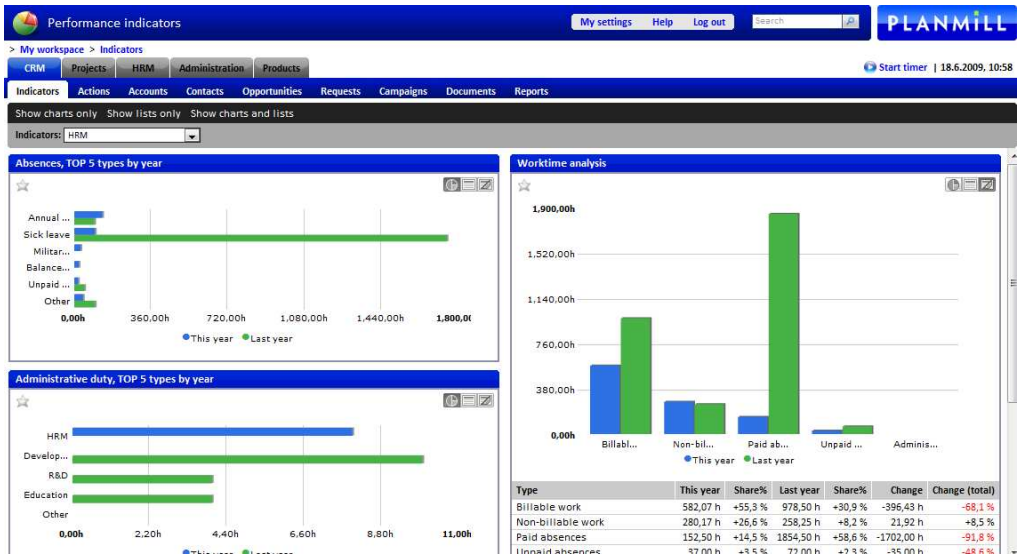

Figure 1. Indicators can be selected to My workspace from Indicator tab

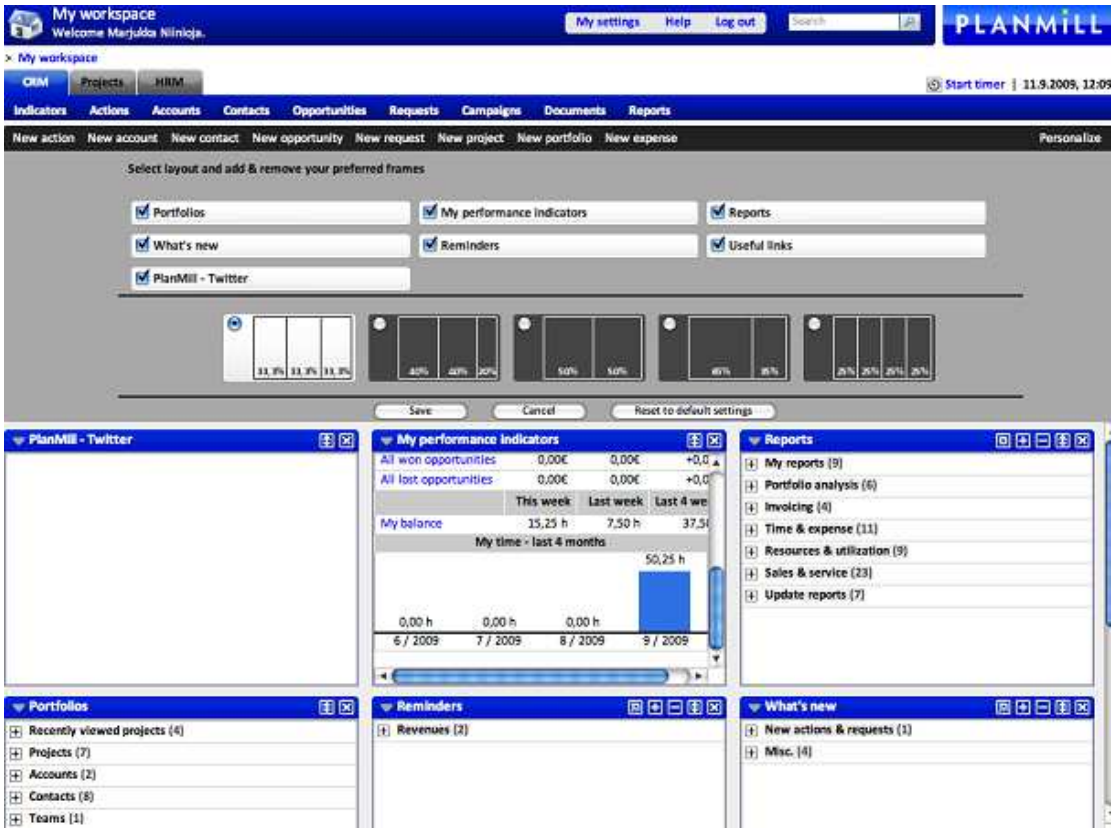

Figure 2. My Workspace in PlanMill showing Personalize tools

PlanMill Absence users can set their own role-based company guidelines on how to implement workspace personalization. In **My Workspace**, all PlanMill users can:

- Customize layout
- Drag and drop frames
- Expand and collapse frames
- Change height of frames
- RSS feeds from **What's new** and **Reminders** frames
- **Indicators**: Select your favorite key performance indicators (KPI) from the **Indicators** tab
- **Reports**: Select your favorite reports from **Reports** tab
- **Useful links**: Add your favorite links
- Custom content: Customized frames, gadgets and widgets can be added.

For more information, view the online demo Personalize your Workspace.

> ***Note:*** Limited support for MS Internet Explorer 6.0. Power users should contact PlanMill Support to activate new functions to user roles.

From **My Workspace > My settings**, users can edit their own **User information** and **User settings**.

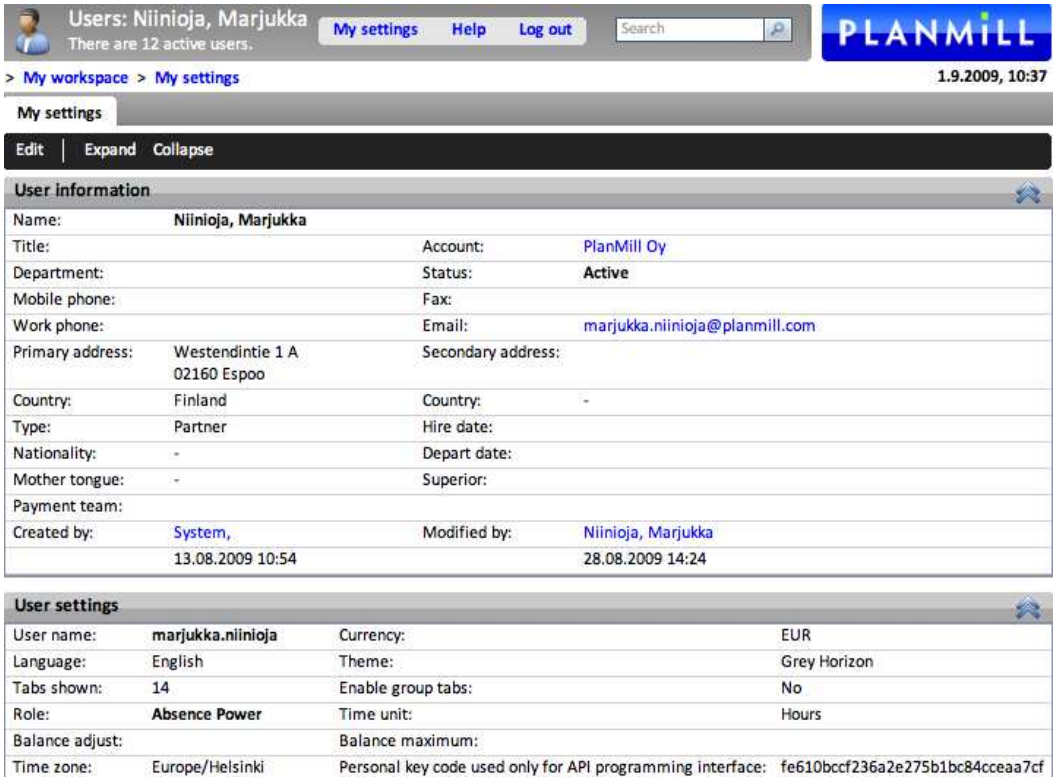

Figure 3. My settings showing user information and settings

3. Key features of PlanMill Absence

PlanMill Absence allows specific actions for different types of users. Below is a description of the features common to all users.

Features for all Absence users

- Allows flexibility (in request and acceptance) with duration of absence period (calculated by hours and days)
- Users are able to enter free text in the description box when requesting an absence
- Allows attachments for each absence request (e.g. certificates for study leave or military duty)
- Automatic email notifications for acceptor when someone requests absence and for the employee when absence is accepted or requested. Allows email notification for the HR or to any other person within the company (anybody that is part of the system as active user)
- See all absence requests in resource calendar (work schedules), also in preliminary status for team/company-wide holiday planning
- Export absence periods to calendar for quick reservation (e.g. iCal)
- Enables view of **Change History** of each Absence
- Creates automatic time reports for ongoing and completed absences (when using add-on Absence module as part of broader use of PlanMill with time reporting functionalities)

Imports and exports

- Users of PlanMill Absence can use default import for earned vacations (how much each person can have annual holiday and bonus holiday each year). The source for the import can be from the HR system or excel or manually entered for each person in the PlanMill User summary.
- Optional exports for actual amounts of absences for each person and absence type for payroll calculations in HR systems is also possible. See availability for different systems in www.planmill.com.

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Automatic calculations

- Enables annual holiday calculation (Finnish annual holiday law implemented by default, but supports also holiday calculations in other countries quite well with default functions)
- Can calculate the total amount of time of absences within the organisation

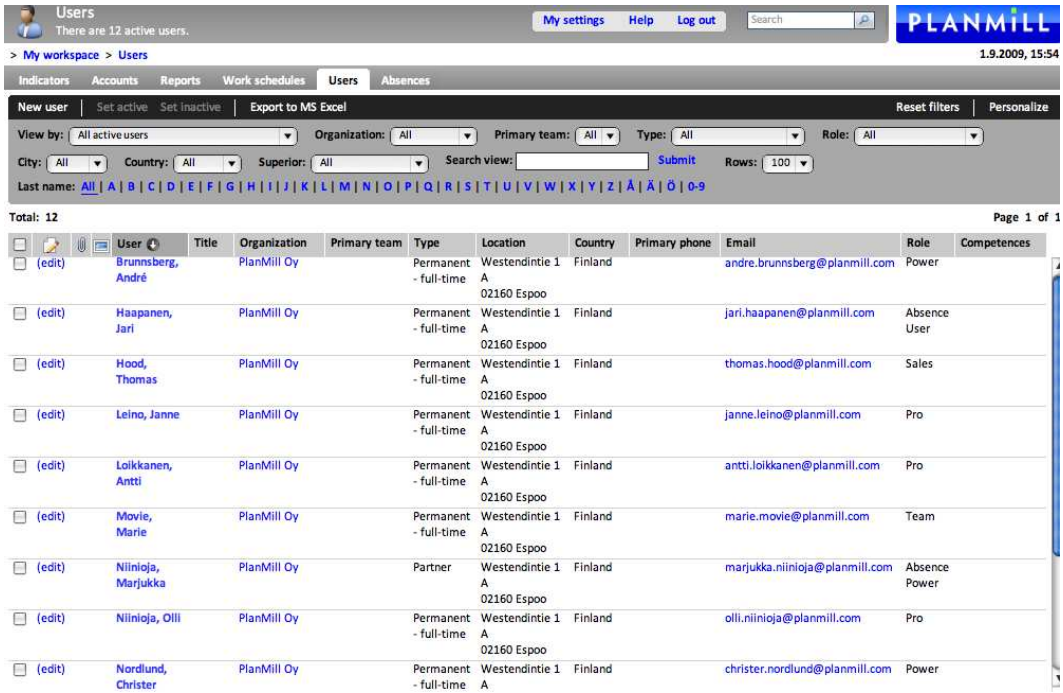
Users
There are 12 active users.
My settings
Help
Log out
Search
PLANMILL
> My workspace > Users
1.9.2009, 15:54
Indicators
Accounts
Reports
Work schedules
Users
Absences
New user
Set active
Set inactive
Export to MS Excel
Reset filters
Personalize
View by: All active users
Organization: All
Primary team: All
Type: All
Role: All
City: All
Country: All
Superior: All
Search view:
Submit
Rows: 100
Last name: All | A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Å | Ä | Ö | 0-9
Total: 12
Page 1 of 1
User
Title
Organization
Primary team
Type
Location
Country
Primary phone
Email
Role
Competences
(edit) Brunnsberg, André PlanMill Oy Permanent - full-time Westendintie 1 A 02160 Espoo Finland andre.brunnsberg@planmill.com Power
(edit) Haapanen, Jari PlanMill Oy Permanent - full-time Westendintie 1 A 02160 Espoo Finland jari.haapanen@planmill.com Absence User
(edit) Hood, Thomas PlanMill Oy Permanent - full-time Westendintie 1 A 02160 Espoo Finland thomas.hood@planmill.com Sales
(edit) Leino, Janne PlanMill Oy Permanent - full-time Westendintie 1 A 02160 Espoo Finland janne.leino@planmill.com Pro
(edit) Loikkanen, Antti PlanMill Oy Permanent - full-time Westendintie 1 A 02160 Espoo Finland antti.loikkanen@planmill.com Pro
(edit) Movie, Marie PlanMill Oy Permanent - full-time Westendintie 1 A 02160 Espoo Finland marie.movie@planmill.com Team
(edit) Niinioja, Marjukka PlanMill Oy Partner Westendintie 1 A 02160 Espoo Finland marjukka.niinioja@planmill.com Absence Power
(edit) Niinioja, Olli PlanMill Oy Permanent - full-time Westendintie 1 A 02160 Espoo Finland olli.niinioja@planmill.com Pro
(edit) Nordlund, Christer PlanMill Oy Permanent - full-time Westendintie 1 A Finland christer.nordlund@planmill.com Power

Figure 4. Types of users in PlanMill Absence

4. Roles and workflow in PlanMill Absence

PlanMill Absence is designed as an easy-to-use everyday tool for existing PlanMill users, as well as for new users who are using PlanMill systems for the first time.
PlanMill Absence allows specific users to perform various actions or roles:

A **Person** is anybody in the company making the absence request and can be a *full time* or *part time* employee. A person, for example, can plan for future absences (generate work schedules and time reports automatically)

An **Acceptor** is the person who is going to accept the employee's absence request. By default, employee's superior is set as the **Acceptor** of the absence request, but the employee can choose any other superior from the acceptor list (for example, if user's own superior is absent)

A **Superior** is defined and automatically set in **User information**. Every user can have one superior (i.e. manager) defined in the user form information. The Superior has the right to accept and reject all absences requested by the employees (users) under him.

> ***Note:*** *Preliminary Status does not generate Email notification. When the Superior approves Absence, Email is automatically sent to the Person requesting the Absence.*

The typical processes covered by PlanMill Absence as a whole is described below. Different users with varied roles are involved in a subset of these processes depending on company policies and responsibilities.

The workflow process describes the common tasks performed by three main user roles in the system: **Person, Superior/ Acceptor**, and **HR**.
Below is a typical workflow process according to specific users. This covers mainly the following typical scenarios such as: **Request/accept, schedule, calculate,** and **getting statistics for absences.**

Person

1. From **HRM > Absences**, create an absence request by clicking **New absence.** Under Absence information, type the relevant information. The **Person** and **Power User** fields are automatically generated.

2. Select **Absence** type from drop-down list. Balance and annual vacation calculations are based on the absence type

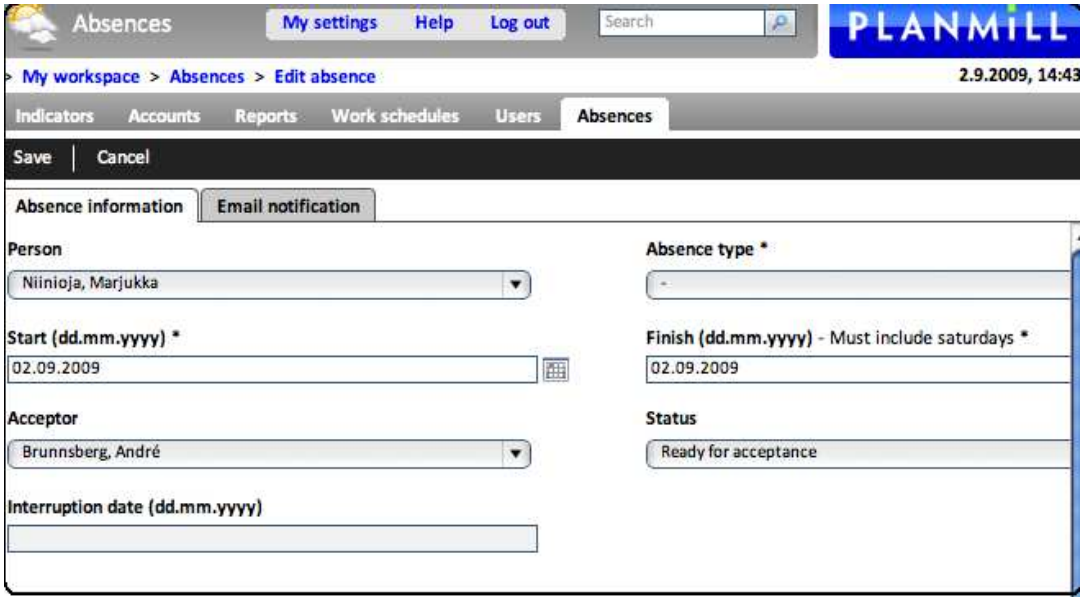

Figure 5. Entering Absence type and Start/Finish in New Absence form

3. Select **Start** and **Finish** dates according to your chosen absence period from the calendar. You can report absences any time: before, during or after the absence period.

> ***Note:*** *Users can select another acceptor (other superiors) for example if their own superior is not available, for example, on vacation.*

5. Set Status as **Preliminary** (useful for initial absence planning) or **Ready for acceptance**. The **Acceptor** receives an automatic email when you save this absence request with the status **Ready for acceptance**.

6. Under **Vacation year amounts**, users can see the **Vacation year,** which is used only for Annual holiday and Bonus holiday pay.

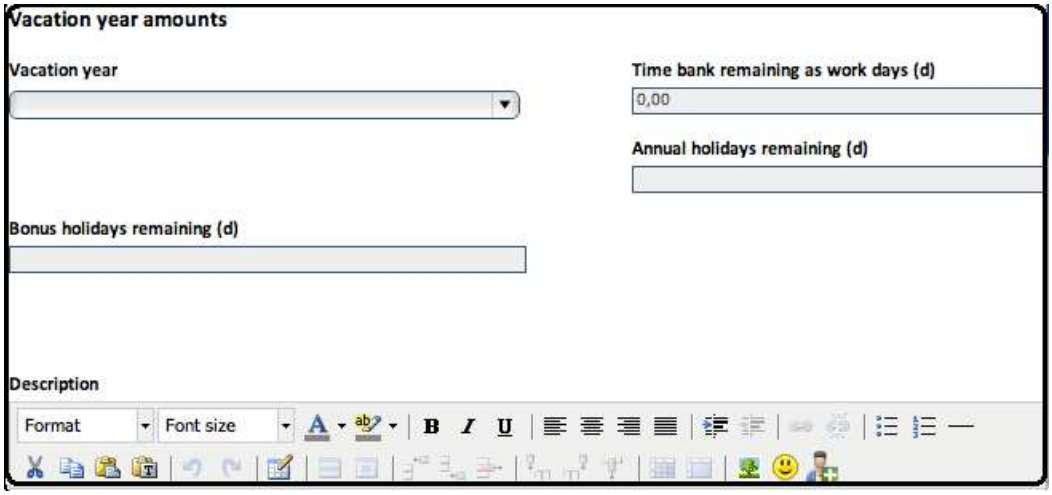

Figure 6. Selecting Vacation year in the New Absence form

7. In the Description box, write something about this absence period.

8. Use the **Email notification** if you want to notify someone else (team, colleague, and others) about your absence. From the **Receivers** box, select names to move to the **Selected** receivers view. In the **Description** box, you may also write something about this absence period.

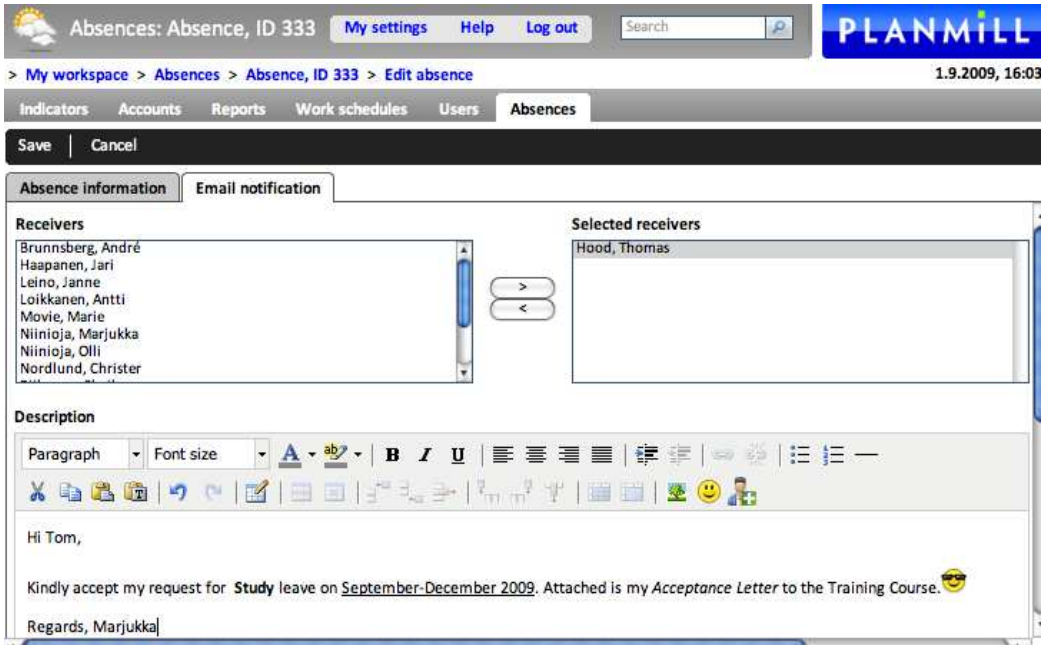

Figure 7. Sending email notification in PlanMill Absence

9. View your list of absences by going back to **Absences** tab. The Absence form checks the data when you try to save the form. For example, overlapping absences or not having vacation days left for the annual holiday cause an error message. Absences will automatically show the schedules in **Work schedules**.

10. Click **Save** to store the information or **Cancel** to remove the absence request.

> ***Note:*** *Absences are automatically scheduled to the correct period. Absence schedules cannot be edited directly from Work schedules, but they will change if the absence period is changed. Time reports are also automatically generated to the correct period. They cannot be manually edited in the Time sheet.*

11. When the start date of the absence period is reached, the status of the absence is change to **Ongoing** or **Completed** and the time reports are generated (not applicable in standalone PlanMill Absence).

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Acceptor

The **Acceptor** in PlanMill Absence is any person listed in the company's database who has a user role that has access rights to accept or reject the request for absence and the Acceptor has to be a superior assigned at least in one user's user form information. Below is the typical workflow of the **Acceptor**.

1. The **Acceptor** receives an automatic email when the absence status is set as **Ready for acceptance**. Absences with this status will also be in the acceptor's absence list view under **Absences to handle**.

2. The **Acceptor** follows the email notification absence link (**Click here** or the absence subject) and enters the PlanMill system and the absence summary of that particular absence request.

The **Acceptor** can accept or reject the absence from the summary page using **Accept/Reject** tools or from the edit –link, by changing the status in the absence form or by choosing any number of absences to accept/reject in the Absence list view by checking the check boxes of the absences to handle.

After checking the boxes, the **Accept/Reject** tools appear in the list view toolbar. Users are then notified with email that their absences are accepted.

Absences as a part of HRM system

1. Select **All absences** from the Absence list view to see all the company absences**.** Use filters to select what you want to see in the list.

2. When an employee or acceptor change the status of an absence request to **Interrupt**, then all users with HR access rights will receive an email notification and can change the status to **Interruption accepted**. They can also directly interrupt an absence.

> ***Note:*** Interruption is necessary when an annual holiday absence has been requested, for example, for four weeks but the employee has to come to work or would have incurred injury after two weeks. Interruption changes the finish date of the absence to interruption date (even after completion) and removes all scheduling and time reports after the new finish date.

3. The HR-users usually have a user role with access rights to update and import earned vacations yearly for users. Manual updating can be done from the **User** module by selecting the user from the link in the user's name and choosing **Edit earned vacations** from this user's summary page.

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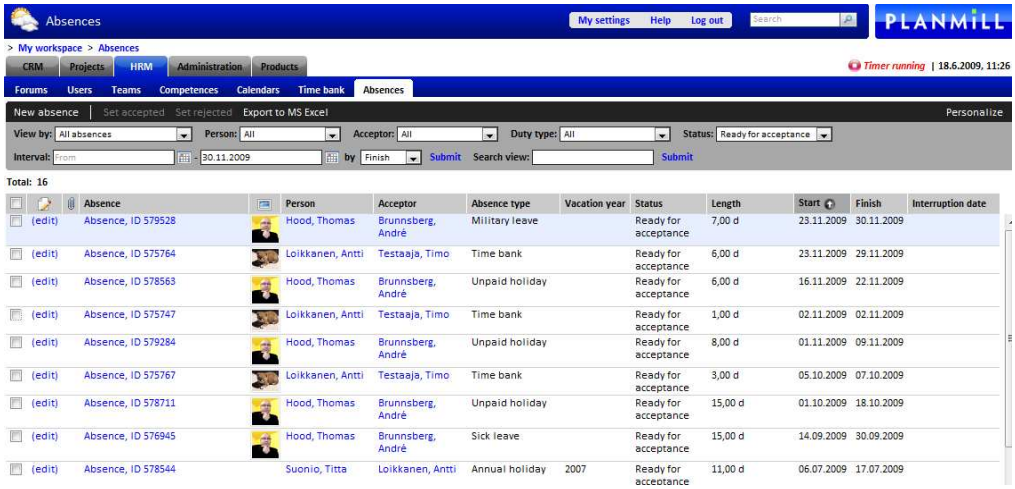
Choose **New vacation year** or edit an existing year when type the amount of days that user can have annual holiday or bonus holiday that year.

> ***Note:*** Earned vacations for the current year are recommended to be entered before users start to request annual holidays or bonus holidays for that year.

Earned vacation information can be imported with a tab-delimited text file also. That is done from the **Administration -> Import**. Contact PlanMill support if you are interested to learn more about import function.


Absences
My settings
Help
Log out
PLANMILL
My workspace > Absences
CRM
Projects
HRM
Administration
Products
Timer running | 18.6.2009, 11:26
Forums
Users
Teams
Competences
Calendars
Time bank
Absences
New absence
Set accepted
Set rejected
Export to MS Excel
Personalize
View by: All absences
Person: All
Acceptor: All
Duty type: All
Status: Ready for acceptance
Interval: From
30.11.2009
by Finish
Submit
Search view:
Submit
Total: 16
Absence
Person
Acceptor
Absence type
Vacation year
Status
Length
Start
Finish
Interruption date
(edit) Absence, ID 579528 Hood, Thomas Brunnsberg, André Military leave Ready for acceptance 7,00 d 23.11.2009 30.11.2009
(edit) Absence, ID 575764 Loikkanen, Antti Testaaja, Timo Time bank Ready for acceptance 6,00 d 23.11.2009 29.11.2009
(edit) Absence, ID 578563 Hood, Thomas Brunnsberg, André Unpaid holiday Ready for acceptance 6,00 d 16.11.2009 22.11.2009
(edit) Absence, ID 575747 Loikkanen, Antti Testaaja, Timo Time bank Ready for acceptance 1,00 d 02.11.2009 02.11.2009
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(edit) Absence, ID 578711 Hood, Thomas Brunnsberg, André Unpaid holiday Ready for acceptance 15,00 d 01.10.2009 18.10.2009
(edit) Absence, ID 576945 Hood, Thomas Brunnsberg, André Sick leave Ready for acceptance 15,00 d 14.09.2009 30.09.2009
(edit) Absence, ID 578544 Suonio, Titta Loikkanen, Antti Annual holiday 2007 Ready for acceptance 11,00 d 06.07.2009 17.07.2009

Figure 8. Selecting Absences to handle in PlanMill Absence

5. Views and fields in PlanMill Absence

List view

Start from the **Absence** tab when you want to:

- Make an absence request
- Accept/Reject absence requests
- View information about absences

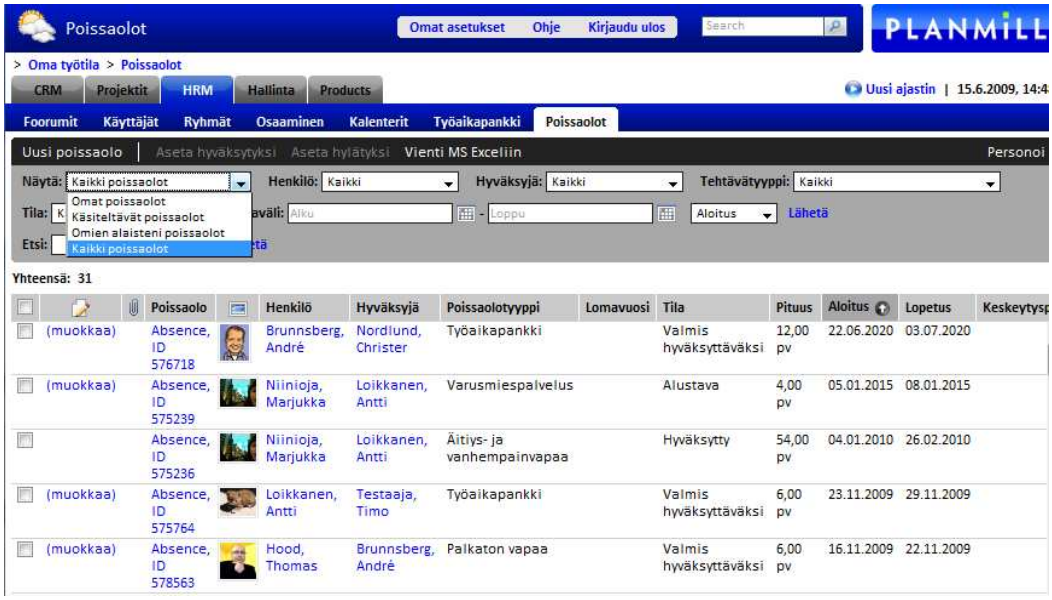

Figure 9. Absence tab in PlanMill Absence

Personalization of list views is possible in PlanMill Absence. The user can also use functions such as **Filters, Select Columns, Sort out order of columns**, and **Export to MS Excel**.

> ***Note:*** *Columns can be sorted using the arrow, which indicates the ascending or descending information.*

Tabs/Categories

In PlanMill Absence, there are two main tabs or categories, namely:

- Absence information
- Email Notification

In Absence information, the user can write relevant information related to the absence application. The **Person** can then send an email notification to any recipients after selecting the names and clicking **Save**.

Default fields

Below are the default fields in PlanMill Absence and how they are used in the system.

Fields	Description
Absence	Absence ID automatically assigned.
Person	The name of the person requesting the absence.
Acceptor	The person who is going to accept your absence request.
Status	Select either Preliminary (initial absence planning) or Ready for acceptance. The values in status list change according to the status of the absence and user's access rights.
Absence type	Choose from drop-down list the nature of absence.
Length	Numerical value in day(s).
Start	The start date (and optional time) of absence.
Finish	The finish date (and optional time) of absence.
Interruption date	Shows Ongoing or Completed absence Interruption date.
Vacation year	Vacation year amounts, containing information about *Vacation year, Time bank remaining as work days, Annual holidays remaining,* and *Bonus holidays remaining.*
Created by	The name of the person creating the absence form.
Modified by	The name of the person modifying the absence form.
Description	A free text field for describing the absence in detail.

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Change History	Shows the name of the person taking actions on the absence form.

Summary view

Click **Edit** to make changes to **Absence information**. You can also use functions such as **View** or **Export iCalendar.** The summary view can be viewed by clicking on the **View** link in the tools section.

In Absence Information, the user can view the completed forms in the **Absence Information Summary Page** located on upper level element of the User Interface. In this view, the user can categorize information as well as expanding and collapsing categories. All users can also perform the following actions: **Edit, View**, and **Export iCalendar.** In addition, the user can view **Change History**, showing who was the last person modifying the absence information as well as the date of modification.

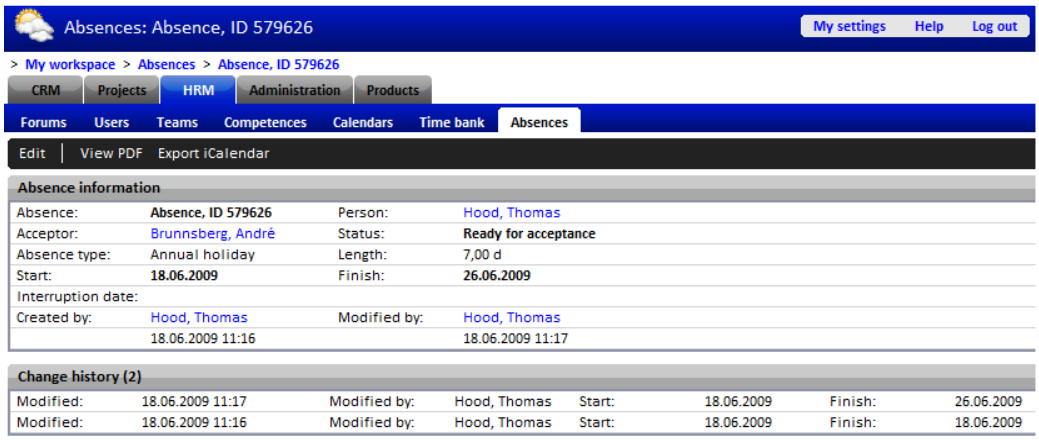

Figure 10. Viewing Absence Information and Change History

6. Modules in PlanMill Absence

In PlanMill Absence, the **Power User** can use all of the modules that are not accessible to all employees or persons with ordinary users' access rights. In the list below, ***Absences** is the only module visible to the user(s).

Modules	Description
Indicators	Refers to planned work versus forecasted work including difference in the actual days that are added. This includes a chart option based on Flash (Adobe).
Reports	Reports assigned to roles listed in one glance; additional description can be added to the report.
Calendars	Users can select the dates including day, month, and year within PlanMill Absence, similar to Work calendars used by the Administrator and HR in the PlanMill system.
Work schedule	Resource planning on a monthly, weekly or daily mode. In standalone Absence users can only view resources but in the ERP system, work schedules allows also to see all resources plans for all projects and tasks and edit the resources schedules.
Absences*	The place to request, view and handle absences when using the Absence module in the PlanMill system
Users	Shows the persons using the PlanMill system and other integrated modules.
Teams	Shows the teams using the PlanMill system and other integrated modules.
Time sheet	Shows real-time recording of daily tasks and integrated with another add-on module, **PlanMill Timer**.

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7. Quick guide scenarios

Case 1. How to Track Annual Vacation

From the **Indicators** view, the employer and HR users can easily view the planned work versus forecasted as well as the different types of absences and the number of occurrences within the organisation.

By clicking on **Absences > Duty Type**, tracking absences for example due to sick leave can also be viewed.

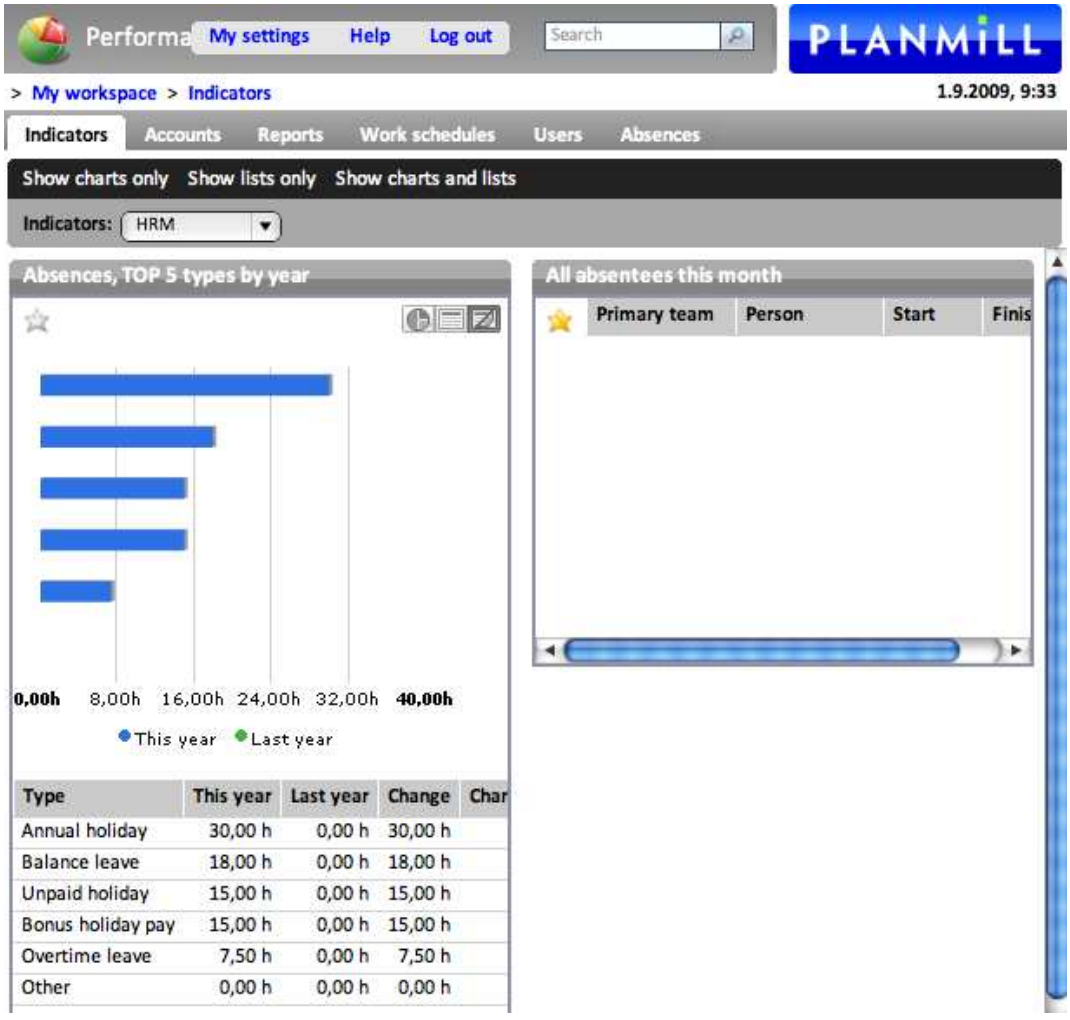

Figure 11. Tracking annual vacations through Indicators

Case 2. I'm not going to be absent but my absence request is already accepted

Work scheduling and Vacation day calculation are always done in every status. If you want to "free" the scheduling or the reserved vacation days,

you can delete the absence request.

To delete the absence, change the status first to **Preliminary** (in **Preliminary** and **Ready for acceptance** status, you can also edit the days for existing absences).

> ***Note:*** *A person can remove own absence request and will always know that the absence request has disappeared from the system when, for example, the acceptor deletes the absence(s).*

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